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Introduction

This document details the installation and use of the Egress Switch desktop client software for Microsoft Windows. All screenshots used are taken from client version 4.1 on Microsoft Windows 8.1 with Office 2013.
Installation

System requirements
Please ensure that the minimum requirements listed below are met before installing the Switch client.

- Microsoft Windows XP/Vista/7/8/8.1
- Microsoft .NET 3.5.1 or later
- Microsoft Visual Studio 2010 Tools for Office Runtime

Egress Switch Client will run on 32-bit and 64-bit versions of Windows.

Installation
The install process is a simple click-through installer delivered in an .exe package. The installation files are available to download for free from the Egress website or can be obtained from a member of the Egress Support team.

To run the installer you MUST have administrator privileges on the target machine (local administration rights will be sufficient).

Important note: the Switch client can be provided as an .msi package and deployed silently using any software deployment application including Active Directory Group Policy and MS SCCM. For further information please see the Egress Switch Client Deployment Guide, available from your Egress Technical Account Manager.

To install the Switch client software please complete the following steps.
1. Log on to the target machine as an administrator and run the Egress installer, the following dialogue will be displayed, click ‘Next’.

2. Select ‘I Agree’ to accept the Egress Software Technologies Ltd license agreement then click ‘Next’ to continue.
3. Select the required installation path and click ‘Next’ to continue.

4. The Switch Outlook Add-in provides seamless integration with Microsoft Outlook. It is highly recommended that you select to install this feature. This option will only be available if Microsoft Outlook is detected during the installation. Click ‘Next’ to continue.
5. To begin the installation, click ‘Next’.

6. To complete the installation click ‘Close’

The Egress Switch icon (️) should now appear in the system tray.
Getting started

You have now installed 3 primary components of Egress Switch on to your workstation:

- **Switch Package Creator** – enables you to create secure packages.
- **Switch Package Library** – allows you to view previously created packages and change their properties as well as giving you delivery reports and a full audit trail.

Before you can use Egress Switch you must create an account on the Egress Switch network. You can sign up in one of the following ways.

- Using the Switch client by selecting ‘Create account’ from the welcome screen or system tray menu.
- An invite from the Egress account administrator within you respective company.

Follow the simple sign up process to create an account. To share secure packages with others you will need to have credits in your account or a subscription. If you have signed up as a free user then you will have 25 free credits which allows you to send to 25 recipients. Alternatively, if you are a business user then you can send an unlimited amount of secure packages.

**Welcome screen**

The welcome screen is displayed once the installer has finished and at first log on, it gives you two main options. You have the ability to hide the welcome screen by deselecting ‘Show this window when you sign in’.

- **Create account** – if you do not already have a Switch ID click this link to register for a free Switch account using the client software.
- **Sign in** – if you already have a Switch ID click this link to sign in to the Switch client with your credentials.
Once you have signed in to the Switch client the welcome screen changes to give the following options.

- **Create package** – loads the Switch Package Creator
- **Create message** – loads a new email within Outlook
- **Sent packages** – opens the Switch Package Library
Signing in

If you have not signed into the client software via the welcome screen you can sign in using the Switch system tray icon. To sign in, first click in the tray and select ‘Sign in’, input your credentials and press enter.

- **Remember me** - automatically stores your Switch ID for the next time you sign in.
- **Remember my password** – automatically stores your password for automatic sign in.
- **Sign in automatically** - Will automatically sign you in to the Switch client after logging on to Windows.
**Switch System Tray**

The Switch System Tray allows quick access to the main features of the software. To access the system tray click on the orange Switch icon (Switch) in the Windows system tray.

- **Create package** - opens the ‘Package Creator’ and enables you to create new secure packages.
- **Create message** - if MS Outlook is installed this will open a new Outlook message. If MS Outlook is not installed it will open a new secure message via Switch Web Access.
- **Sent packages** - Allows you to browse previously created secure packages and configure their properties.
- **Settings** - from within settings you can update your personal information and configure transfer settings for uploads.
- **Sign out** - allows you to sign out of the Switch software.
### Settings

The settings window allows you to view information about the current user as well as customise transfer settings for package uploads.

- **Refresh policy** - connect to the Egress Server Infrastructure and to download the latest user policies.
- **Edit** – allows you to modify your personal information via Switch Web Access.
- **Change password...** - change the password for your Switch account.
- **Concurrent uploads** – alter how many uploads can take place at the same time.
- **Retry attempts** – configure how many times the Switch client should retry uploading a package which has failed to upload.
- **Delay between retries** – set the delay between retry attempts for failed uploads.
Package Creator

The Switch Package Creator application allows you to create secure packages and assign the intended recipient(s) access rights to that package. The main window for the Switch Package Creator application resembles that of an email client. To access package creator select ‘Create package’ from the Switch System Tray or right click any file or folder and select ‘Secure with Switch’.

- **Restrictions** – select this to add time restrictions to your package if you only want it to be accessed after a certain date/time or until a certain date/time. This is optional, packages can be created with no restrictions.
- **Add file** – add any files from your computer to your package.
- **Add folder** – add any folder from your computer to the package.
- **Address book** - open the Switch address book. The address book enables you to create your own recipients for Switch but will also integrate with the MS Exchange/Outlook address book if available.
- **Sent packages** – opens your package library to view previously created packages as well as modify their properties.
- **‘To...’** – if clicked, this gives direct access to the address book. Alternatively, enter recipient’s email address manually into the field provided, separate by a semi-colon if there is multiple addresses. Only people listed in the ‘To...’ field will be able to gain access to the package. Packages can be created with no recipients defined, it is also possible to add new recipients once the package has been created.
- **Subject** – Define a subject for your package. Packages can be created with no subject defined.
- **Tags** – allows you to assign arbitrary key words to the package. Tags are a useful tool to locate package items in the package library at a later date. Packages can still be created with no tags assigned.

Click ‘Create’ to start the creation wizard. You will see a progress bar and then a window similar to the one below. The options displayed are configurable by a system administrator meaning you may not see all of the options listed below.
Secure CD/DVD

Select this to burn your secure package to a CD or DVD.

You will be asked to specify the CD/DVD drive you would like to use to burn the package. In most cases there will be only one drive and this will be selected automatically, ensure that the message ‘Data is ready to be written to disc’ is displayed before clicking ‘Next’.

As the package is burned to disc a progress bar will be displayed, once this is complete you receive summary of the package creation. Click ‘Finish’, it is now safe to remove the CD/DVD from your computer.
Secure Email Attachment

Select this to encrypt files and send them as a secure package attached to an email.

A progress bar will be displayed as the package is created, once complete, a summary of the package creation will be shown, click ‘Finish’. A new email will open up within Outlook that will look similar to the one pictured below. Recipients and subject will be populated with the recipients and subject defined when creating the package. Click ‘Send’ to send the attachment.
Switch Package
Select this to encrypt files and save them as a secure package on your computer or removable media.

The location of where you would like to save the files needs to be specified before creation. You can browse to your preferred location or enter it manually. Click ‘Next’.

A progress bar will be displayed as the package is created, once complete, a summary of the package creation will be shown, click ‘Finish’. The file location will open in Windows Explorer if this option was selected on the summary screen.
**Upload to Egress Cloud**

Select this option to encrypt files and upload them to the Egress Secure Cloud.

A progress bar will be displayed as the package is created, once complete, a summary of the package creation will be shown, click ‘Finish’. A new email will open up within Outlook that will look similar to the one pictured below, this contains a web link which the recipient can use to retrieve the secure package online. Recipients and subject will be populated with the recipients and subject defined when creating the package.

**Please note:** If no recipients were entered when creating the package then a new mail window in Outlook will not open. The web link is still accessible through package properties if it is needed at a later time.

Visit [https://reader.egress.com/remote.aspx?56a78e08-a607-4eb3-8dbb-57c9b3768ed0](https://reader.egress.com/remote.aspx?56a78e08-a607-4eb3-8dbb-57c9b3768ed0) to access it online.

You will need to create an Egress Switch ID and password. This takes approximately 1 minute and will only be required once.
Package Library

Once a Switch Package has been created the author remains in control of that package even after it has left the network where it was created. The Switch Package Library provides a way to manage and control the life cycle of all packages that have been created. You can access the package library by selecting ‘Sent packages’ from the system tray menu or Outlook ribbon.

Packages

Switch Packages can take the following forms.

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<thead>
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<tbody>
<tr>
<td>Secure email</td>
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<td>Secure email attachment</td>
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<tr>
<td>Secure CD/DVD</td>
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<tr>
<td>Secure file</td>
<td></td>
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<tr>
<td>Secure cloud upload</td>
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</tr>
</tbody>
</table>

The Switch Package Library organises packages into smart folders. You can easily locate packages based on date, type and classification. The following folders are displayed on the left hand side of the package library.

- **Recently created** - lists the last 25, 50 or 100 packages created and registered with the Switch server.
- **Today** - lists packages created and registered with the Switch server on the current day.
• **This week** - lists packages created and registered with the Switch server within the last 7 days.
• **Last week** - lists packages created and registered with the Switch server in the previous 7 days.
• **Last month** - lists packages created and registered with the Switch server in the previous calendar month.
• **Last 30 days** - lists packages created and registered with the Switch server within the current calendar month.
• **All** - Displays a complete list of all packages created and registered with the Switch server.
• **Expired** - lists packages with time restrictions that have expired.
• **Revoked** - lists packages where all access rights have been revoked.
• **Pending requests** - displays a list of packages that have pending access requests.
• **Search** - when trying to locate package items in the library it is possible to use the search feature to identify packages based on a simple or advanced criteria.
• **Outbox** - displays all active package uploads.
## Package Properties

**Properties**

Once a package has been created, the properties (including details, validity and access rights) can be controlled remotely, even if the package has left your physical network. To access the properties of a particular package, double click the package in the package library.

![Package properties dialog box](image)

- **Package label** - unique identifier assigned to the package automatically on creation.
- **Registered at** - package registration date and time.
- **Contents** - view the file contents and structure of the package.
- **Subject** - the subject of the package.
- **Tags** - arbitrary key words assigned to the package.
- **Status** – determine whether the package is ‘Active’ (accessible by anyone on the list of recipients) or ‘Revoked’ (access is disabled for everyone).
- **Classification** - control the classification level of the package.
- **Valid from/valid until** – modify or add time restrictions to the package.
Access

Each Switch Package has a defined list of recipients, these are the people that will be able to gain access a particular package. To control who has access to a package use the ‘Access’ tab in package properties. All recipients who are permitted access will be listed in the ‘Authorised’ box. To add people to the access list click ‘Edit’ and then define the email address of the person you are adding or select them from your address book. Likewise, to remove recipients select the appropriate recipient in the list and click ‘Remove’.
**Offline Access**

This tab will be shown if offline access has been enabled via policy. In the event that a recipient is unable to access a Switch Package due to being offline it is possible to issue a secure password to enable full offline access. Click 'Show passwords' to reveal the secure passwords. Different levels of access can be determined by policy.

**Important Note:** This feature should only be used when there is no opportunity for online access. Once the offline password has been issued it is no longer possible to change access permissions or revoke the package.
**Delivery Reports**

This tab shows a summary of who has accessed a secure package. The Switch ID and time of first access and last access is displayed for each user.
Audit Events

The ‘Audit Events’ tab contains detailed information about the lifecycle of a secure package. You can view authorized/unauthorized access attempts.

- **Date** - the date when the audit event occurred.
- **Details** - shows details of the event.
- **IP Address** - records the internet IP address where the audit event occurred. The link shows a geographic summary of where the event occurred.
Microsoft Outlook add-in

The Egress Switch Outlook add-in provides transparent package creation from within Outlook 2007/2010/2013. When the Switch Outlook add-in is installed you will notice some extra buttons in the ribbon.

When viewing a received message, under the ‘Message’ tab you will see ‘Sent Packages’, selecting this will take you directly to the Switch Package Library where you can view previously created packages.

When viewing a sent encrypted message, under the ‘Message’ tab you will see ‘Message Properties’, selecting this will take you directly to the package properties of the particular package that you are viewing.

Under the ‘Home’ tab when viewing your inbox or sent items you will also see ‘Sent Packages’ (Outlook 2010/2013 only).
When composing a new email, under the ‘Message’ tab there are two extra buttons in the top left hand corner, as highlighted below.

- **Unprotected** – this shows the classification of the email you are creating. Select this button to display the security label list, by default you will have two security labels, ‘Unprotected’ or ‘Encrypt message and attachments’ as shown below.

- **Message Restrictions** - allows you to configure ‘Valid from’ and ‘Valid until’ dates/time restrictions for the message. Please note that these restrictions are optional and can be changed at any point even after the email has been sent.
Policy configuration

At the heart of the Egress Switch Infrastructure is a powerful policy and classification engine. This centrally managed engine allows administrators to enforce decisions over how data should be sent, what security policies are required and how data access is audited. If permitted, users can choose their own level of security when exchanging information but this decision can be overridden by centrally defined policies.

Any number of classifications or policies can be defined to suit your organisation’s workflow. This includes; completely automating the classification process for end users; allowing users to make decisions as to whether the information being sent is safe enough for public access, or controlling highly sensitive data so it cannot be accessed outside your organisation.

For more information on Egress policies and what is possible please refer to the Egress Switch Branding & Policy Decisions document.
Switch Support Centre

Should you encounter any problems with Egress Switch please visit the Egress Software Technologies Support Centre [www.egress.com/support].

Useful contact information:

Egress Main Switchboard: +44 (0)207 624 8500
Egress Fax: +44 (0)207 624 8200
Egress Website Address: [http://www.egress.com]
Egress Sales: [sales@egress.com]
Account Services: [accountservices@egress.com]
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